

# Swarthmore College



## Electronic W-4 Form Creation, Update and Printing Instructions

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## Overview

In the interest of sustainability, Swarthmore College requires employees to create and update their W-4 form electronically via mySwarthmore. Paper forms are no longer used, unless you are an international student.

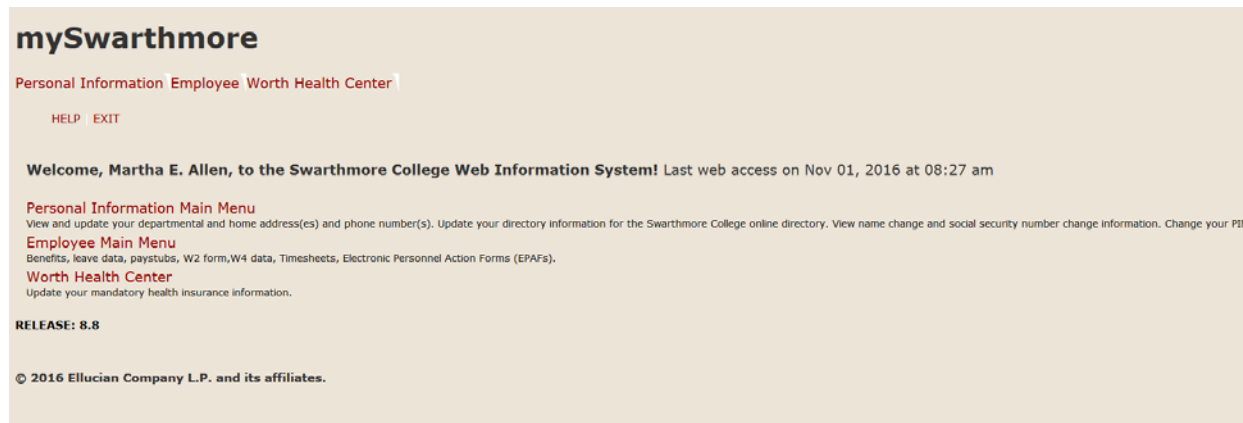
The following instructions are applicable to faculty, staff and students. They are segregated by the following categories:

- (1) Current employees (i.e., you currently are working for Swarthmore College)
- (2) New employees (i.e., you have never worked for Swarthmore College)
- (3) Re-hired employees (i.e., you previously held a position at Swarthmore College)

## Current Employee Instructions

The following process should be followed after successfully logging in to mySwarthmore to print or update your W-4:

- 1) Select the link for the Employee Main Menu



**mySwarthmore**

[Personal Information](#) [Employee](#) [Worth Health Center](#)

[HELP](#) [EXIT](#)

Welcome, **Martha E. Allen**, to the Swarthmore College Web Information System! Last web access on Nov 01, 2016 at 08:27 am

**Personal Information Main Menu**  
View and update your departmental and home address(es) and phone number(s). Update your directory information for the Swarthmore College online directory. View name change and social security number change information. Change your PIN.

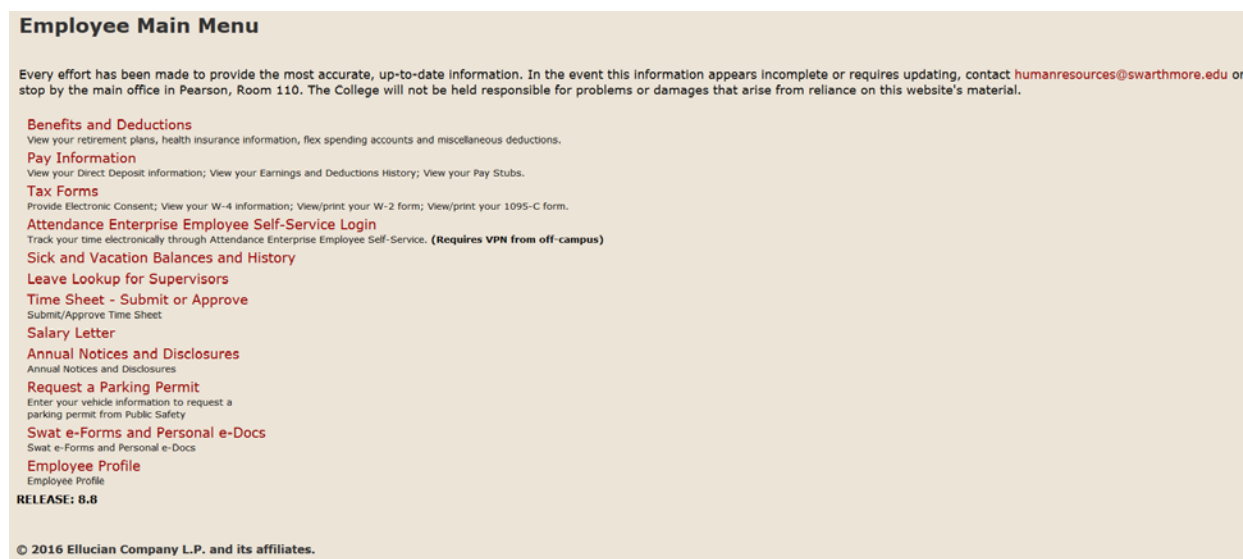
**Employee Main Menu**  
Benefits, leave data, paystubs, W2 form, W4 data, Timesheets, Electronic Personnel Action Forms (EPAFs).

**Worth Health Center**  
Update your mandatory health insurance information.

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- 2) Select the link for Tax Forms



**Employee Main Menu**

Every effort has been made to provide the most accurate, up-to-date information. In the event this information appears incomplete or requires updating, contact [humanresources@swarthmore.edu](mailto:humanresources@swarthmore.edu) or stop by the main office in Pearson, Room 110. The College will not be held responsible for problems or damages that arise from reliance on this website's material.

**Benefits and Deductions**  
View your retirement plans, health insurance information, flex spending accounts and miscellaneous deductions.

**Pay Information**  
View your Direct Deposit information; View your Earnings and Deductions History; View your Pay Stubs.

**Tax Forms**  
Provide Electronic Consent; View your W-4 information; View/print your W-2 form; View/print your 1095-C form.

**Attendance Enterprise Employee Self-Service Login**  
Track your time electronically through Attendance Enterprise Employee Self-Service. **(Requires VPN from off-campus)**

**Sick and Vacation Balances and History**

**Leave Lookup for Supervisors**

**Time Sheet - Submit or Approve**  
Submit/Approve Time Sheet

**Salary Letter**

**Annual Notices and Disclosures**  
Annual Notices and Disclosures

**Request a Parking Permit**  
Enter your vehicle information to request a parking permit from Public Safety

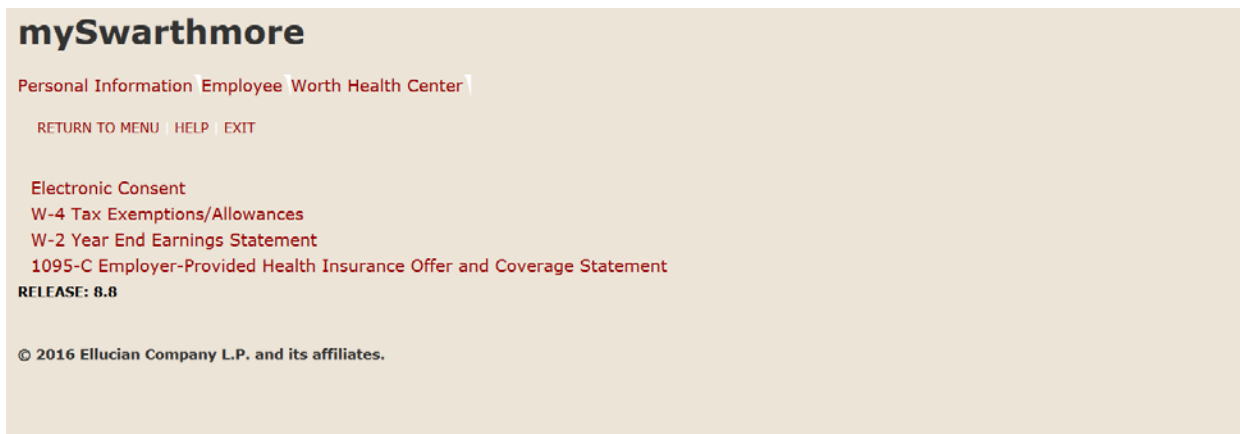
**Swat e-Forms and Personal e-Docs**  
Swat e-Forms and Personal e-Docs

**Employee Profile**  
Employee Profile

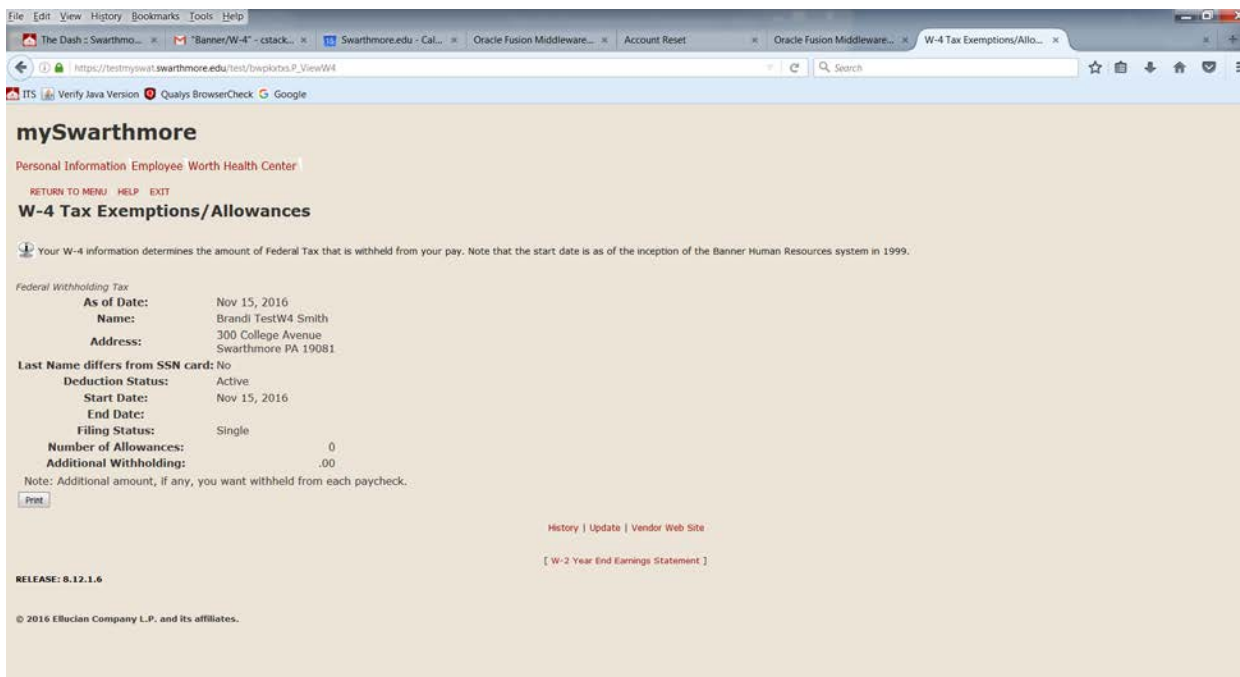
**RELEASE: 8.8**

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3) Select the link for W-4 Tax Exemptions/Allowances



4) The W-4 Tax Exemptions/Allowance page is displayed with your current W-4 information as of today's date.



- 5) If you wish to print your current W-4, select the Print button. Use your browser's print function to print your W-4 form. When finished select the Go Back link to return to the prior page.

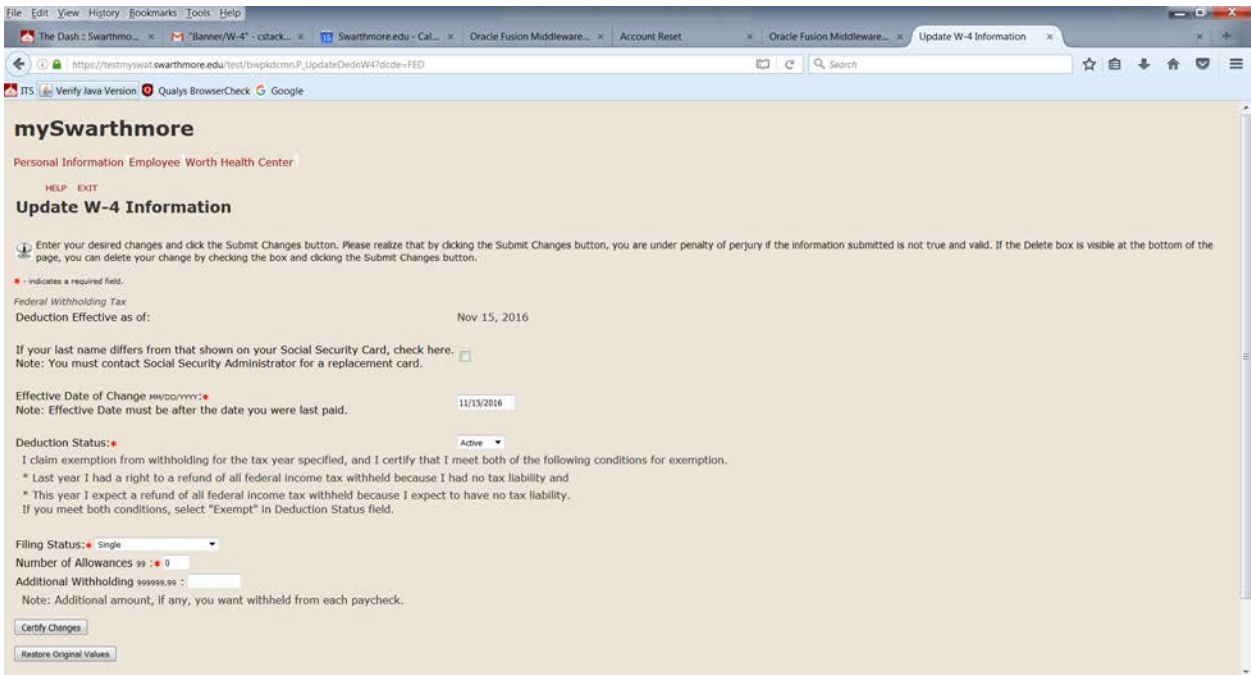
W-4		Employee's Withholding Allowance Certificate		2016
Form <b>W-4</b> Department of the Treasury Internal Revenue Service Whether you are entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be requested to send a copy of this form to IRS.				
1 Your first name and middle initial Brand T		Last name Smith		2 Your social security number 365-09-1234
Home address (number and street or rural route) 300 College Avenue		3 <input checked="" type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Married, but withhold at higher Single rate. <small>Note. If married, but legally separated, or spouse is a nonresident alien, check the "Single" box.</small>		
City or town, state, and ZIP code Swarthmore PA 19081		4 If your last name differs from that shown on your social security card, check here. You must call 1-800-772-1213 for a replacement card. .... <input type="checkbox"/>		
5 Total number of allowances you are claiming (from line H above or from the applicable worksheet on page 2)				6 \$
6 Additional amount, if any, you want withheld from each paycheck .....				7 \$
7 I claim exemption from withholding for 2016, and I certify that I meet both of the following conditions for exemption. Last year I had a right to a refund of all federal income tax withheld because I had no tax liability and This year I expect a refund of all federal income tax withheld because I expect to have no tax liability. If you meet both conditions, write "Exempt" here .....				
Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.				
Employee's signature (This form is not valid unless signed.)				Date
8 Employer's name and address (Employer: Complete lines 8 and 10 only if sending to the IRS.) Swarthmore College 300 College Avenue Swarthmore PA 19081		9 Office code (optional)	10 Employer identification number (EIN) 231352683	

[Go Back](#)

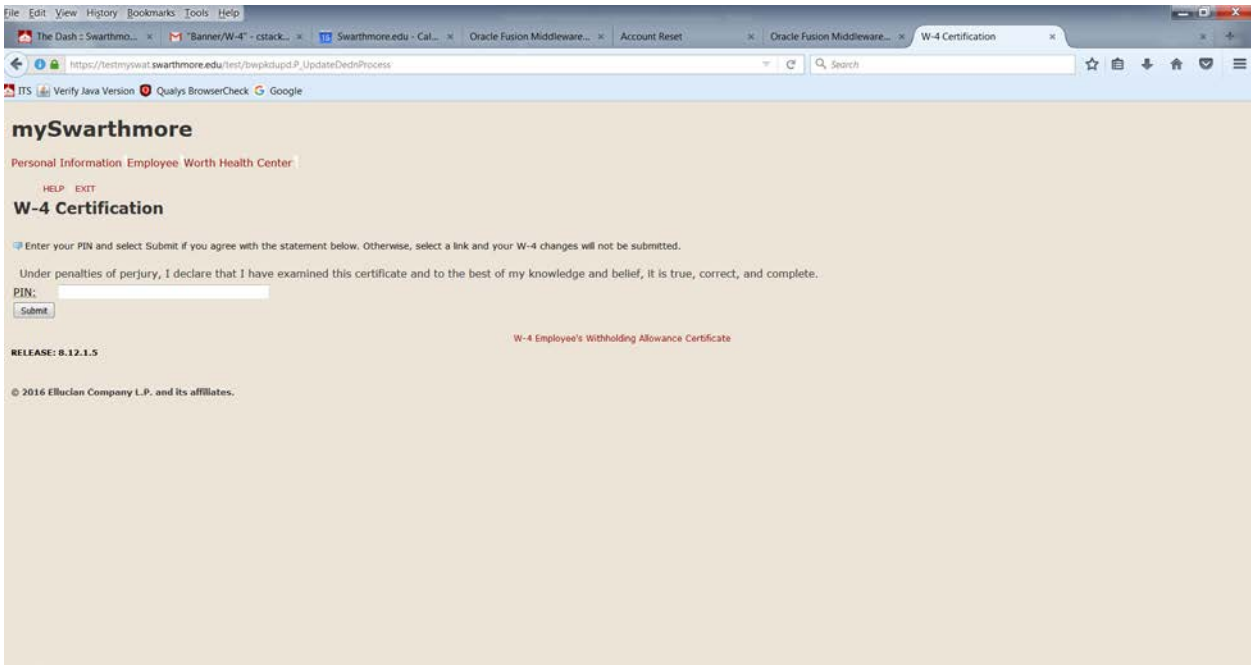
- 6) To change your W-4 information:
- Select the Update link near the center, bottom of the page.
  - The Update W-4 Information page will be displayed.
  - For existing employees, you can select the effective date of the change, but it must be a date after your last paid date. The Effective Date will automatically default to the day after the date on which you were last paid.
  - Make any other changes on this page as desired.
  - Select the Certify Changes button.

Caution: If you change your deduction status to Exempt, you must meet the eligibility requirements as stated. You will not have federal taxes withheld from your paycheck. You may be liable additional taxes and IRS penalties as a result. Contact the Payroll office if you have any questions regarding use of this status.

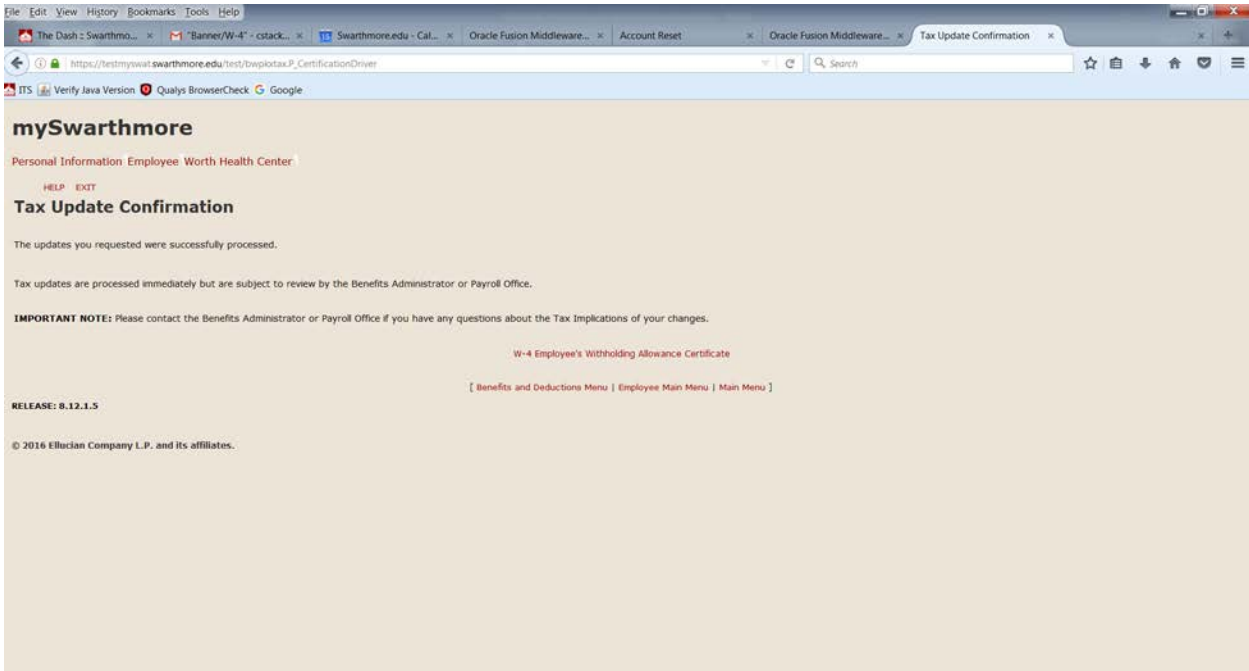
Note: At any time before you successfully certify your changes, you can select the Restore Original Values button and the page will reset all data.



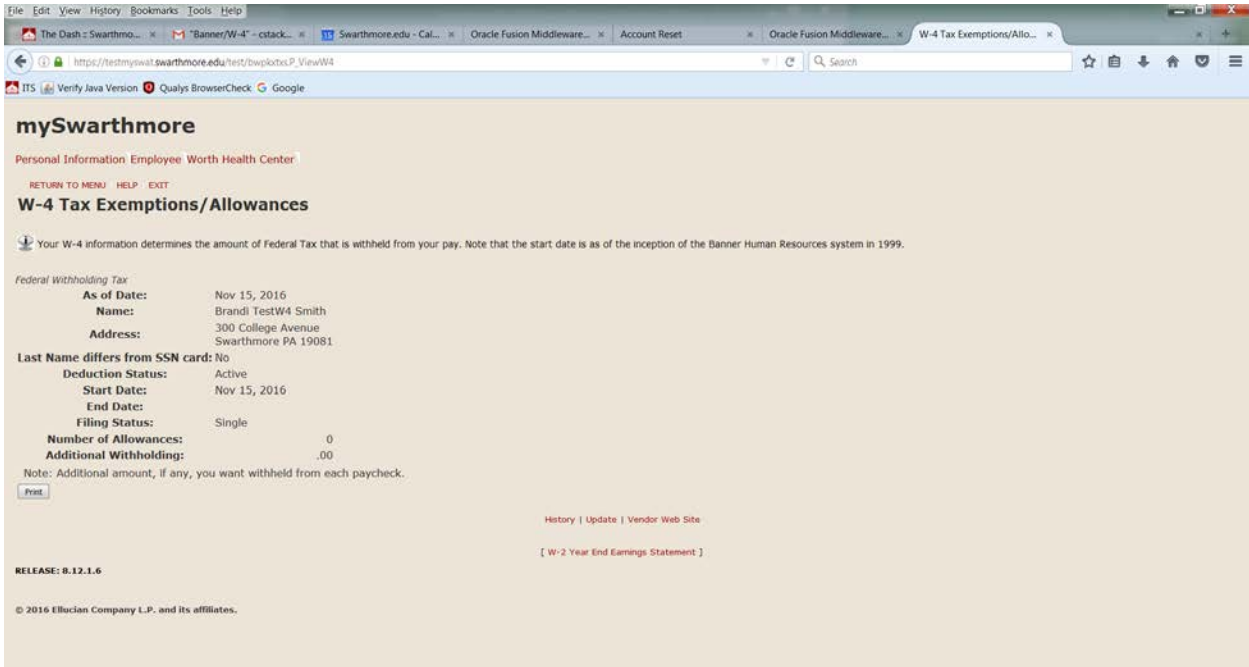
- 7) When you select Certify Changes, you will be presented with the W-4 Certification page. Enter your **network password** as your PIN and select Submit to sign off on your changes. An electronic audit of the person making the change will be kept on file.



8) If your changes are successfully processed, you will be presented with the following page:



9) You may select the W-4 Employee's Withholding Allowance Certificate link near the bottom of the page to return to the W-4 Tax Exemptions/Allowance page to verify that your changes were processed.



Note: You will not see changes if they take effect in the future; this page shows your information as of today. If you wish to view all of your W-4 information both past and future, select the History link at the bottom of the page.

## New Employee Instructions

1. Follow steps 1-4 above for Active Employees
2. At step #4, the W-4 Tax Exemptions/Allowances page will show a Filing Status of Single and Number of Allowances as zero. Single and zero are the default values as mandated by the IRS for an employee who has not filed a W-4 with their employer. If these values are correct for you, you do not need to make any changes. You can simply exit the page.

The screenshot shows a web browser window with the URL [https://testmyswat.swarthmore.edu/test/bwplxtxs.P\\_ViewW4](https://testmyswat.swarthmore.edu/test/bwplxtxs.P_ViewW4). The page title is "mySwarthmore" and the user is logged in as "Employee". The page content includes:

- Navigation links: [RETURN TO MENU](#), [HELP](#), [EXIT](#)
- Section: **W-4 Tax Exemptions/Allowances**
- Information: Your W-4 information determines the amount of Federal Tax that is withheld from your pay. Note that the start date is as of the inception of the Banner Human Resources system in 1999.
- Section: *Federal Withholding Tax*
- Fields:
  - As of Date:** Dec 09, 2016
  - Name:** Michael Patrick Smith
  - Address:** 102 Snyder Ave, West Chester PA 19382
  - Last Name differs from SSN card:** No
  - Deduction Status:** Active
  - Start Date:** Nov 07, 2016
  - End Date:**
  - Filing Status:** Single
  - Number of Allowances:** 0
  - Additional Withholding:** .00
- Note: Additional amount, if any, you want withheld from each paycheck.
- Buttons: [Print](#), [History](#), [Update](#), [Vendor Web Site](#)
- Footer: [\[ W-2 Year End Earnings Statement \]](#), **RELEASE: 8.13.1**

3. As a new employee, if you wish to update your W-4 information, take note of the Start Date. This typically will be your first day of work. The As of Date displayed is today's date and it is reflective of the fact that the information you are viewing is as of today's date.

Next, select the Update link at the bottom, center of the page. The Update W-4 Information page will be displayed:



mySwarthmore  
Personal Information Employee  
HELP EXIT  
**Update W-4 Information**

Enter your desired changes and click the Submit Changes button. Please realize that by clicking the Submit Changes button, you are under penalty of perjury if the information submitted is not true and valid. If the Delete box is visible at the bottom of the page, you can delete your change by checking the box and clicking the Submit Changes button.

\* - indicates a required field.

Federal Withholding Tax Deduction Effective as of: Dec 09, 2016

If your last name differs from that shown on your Social Security Card, check here.   
Note: You must contact Social Security Administrator for a replacement card.

Effective Date of Change   
Note: Effective Date must be after the date you were last paid.

Deduction Status:

I claim exemption from withholding for the tax year specified, and I certify that I meet both of the following conditions for exemption.

- \* Last year I had a right to a refund of all federal income tax withheld because I had no tax liability and
- \* This year I expect a refund of all federal income tax withheld because I expect to have no tax liability.

If you meet both conditions, select "Exempt" in Deduction Status field.

Filing Status:

Number of Allowances

Additional Withholding \$9999.99

Note: Additional amount, if any, you want withheld from each paycheck.

4. Enter the Start Date that you noted in the previous step (step #3) in the Effective Date of Change.

Note: Typically, the Effective Date of Change is your first day of work. Ignore the statement regarding the Effective Date must be after the date you were last paid (as you have not been paid at this point).

Caution: If the Effective Date of Change is a date in the future, you will be taxed at the Single with zero exemption rate until that date.

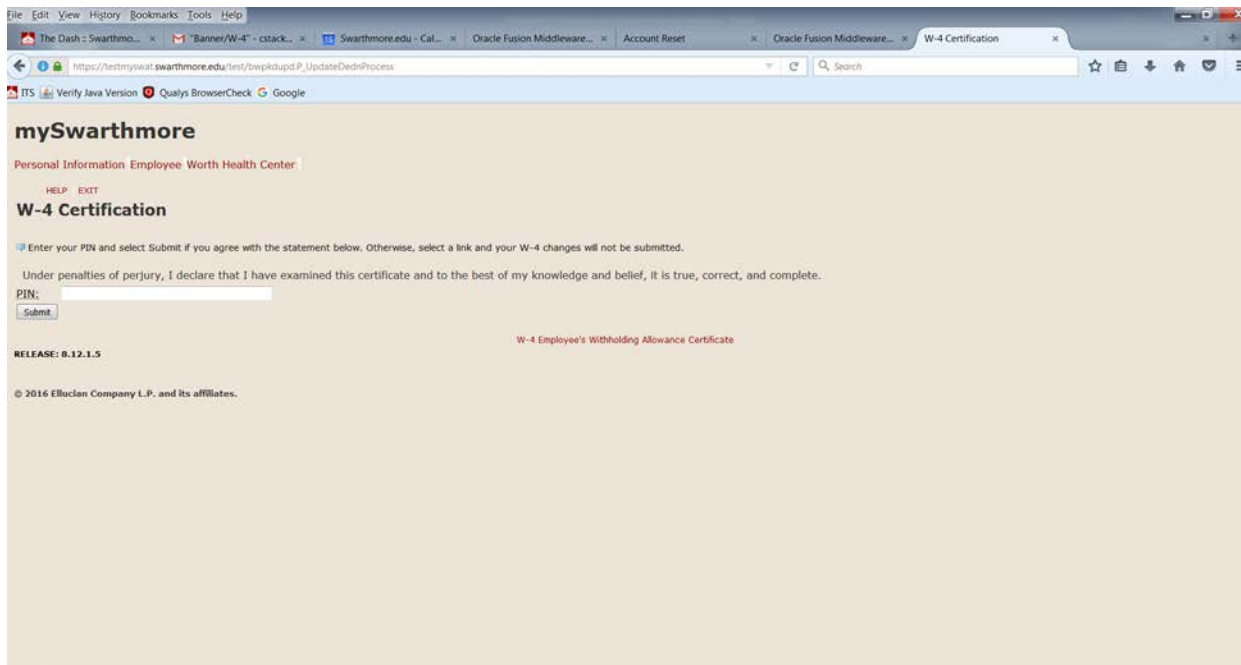
5. Update the Deduction Status, Filing Status, Number of Allowances and Additional Withholding fields as desired.

Caution: If you change your deduction status to Exempt, you must meet the eligibility requirements as stated. You will not have federal taxes withheld from your paycheck. You may be liable additional taxes and IRS penalties as a result. Contact the Payroll office if you have any questions regarding use of this status.

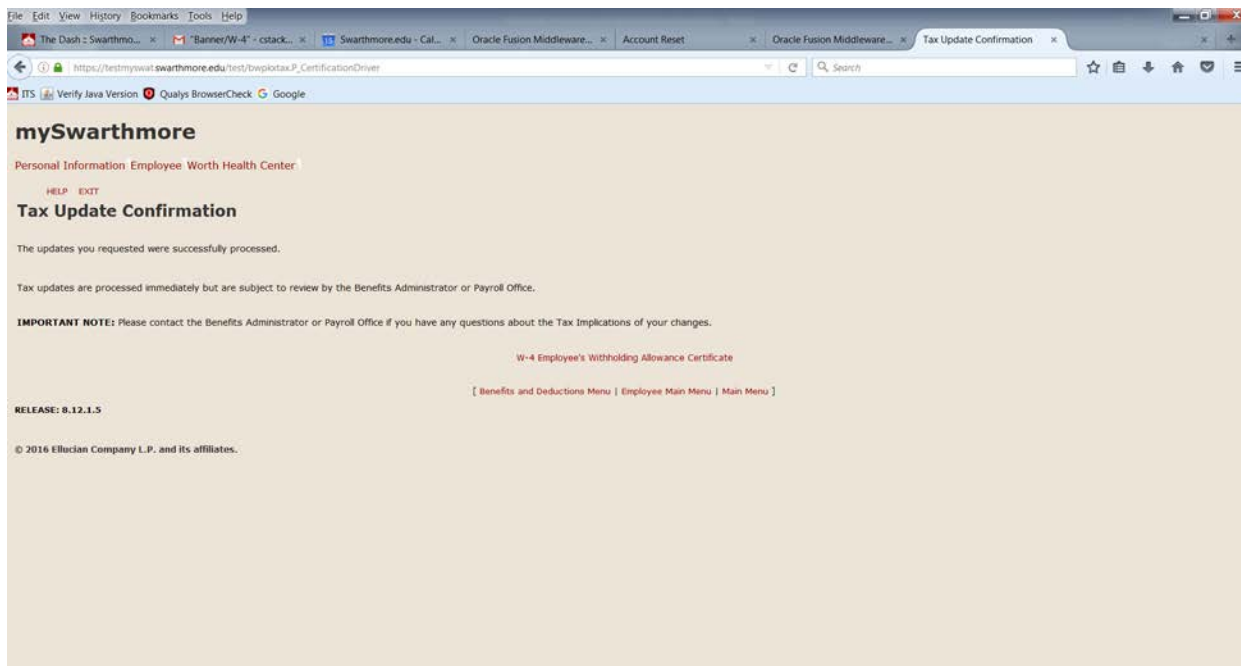
6. Select the Certify Changes button.

Note: Select the Restore Original Values button if you do not want to save your changes.

- When you select Certify Changes, you will be presented with the W-4 Certification page. Enter your **network password** as your PIN and select Submit to sign off on your changes. An electronic audit of the person making the change will be kept on file.



- If your changes are successfully processed, you will be presented with the following page:



- You may select the W-4 Employee's Withholding Allowance Certificate link near the bottom of the page to return to the W-4 Tax Exemptions/Allowance page to verify that your changes were processed.

File Edit View History Bookmarks Tools Help

The Dash - Swarthmo... Banner/W-4 - cstack... Swarthmore.edu - Cal... Oracle Fusion Middleware... Account Reset Oracle Fusion Middleware... W-4 Tax Exemptions/Allo...

https://testmyswat.swarthmore.edu/test/bwplotxcP\_ViewW4

ITS Verify Java Version Qualys BrowserCheck Google

# mySwarthmore

Personal Information Employee Worth Health Center

RETURN TO MENU HELP EXIT

## W-4 Tax Exemptions/Allowances

Your W-4 information determines the amount of Federal Tax that is withheld from your pay. Note that the start date is as of the inception of the Banner Human Resources system in 1999.

*Federal Withholding Tax*

<b>As of Date:</b>	Nov 15, 2016
<b>Name:</b>	Brandi TestW4 Smith
<b>Address:</b>	300 College Avenue Swarthmore PA 19081

**Last Name differs from SSN card:** No

<b>Deduction Status:</b>	Active
<b>Start Date:</b>	Nov 15, 2016
<b>End Date:</b>	
<b>Filing Status:</b>	Single

<b>Number of Allowances:</b>	.0
<b>Additional Withholding:</b>	.00

Note: Additional amount, if any, you want withheld from each paycheck.

[History](#) | [Update](#) | [Vendor Web Site](#)

[ W-2 Year End Earnings Statement ]

RELEASE: 8.12.1.6

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Note: You will not see changes if they take effect in the future; this page shows your information as of today. If you wish to view all of your W-4 information both past and future, select the History link at the bottom of the page. Use the Print button if you wish to print a copy of your W-4 form for your records.

# Re-Hired Employee Instructions

1. Follow steps 1-4 above for Active Employees
2. At step #4, the W-4 Tax Exemptions/Allowances page will show the Filing Status and Number of Allowances that you had when you last worked for Swarthmore College. The values displayed are as of today's date (As of Date). If these values are correct for you, you do not need to make any changes. You can simply exit the page.

The screenshot shows a web browser window with the URL [https://testmyswat.swarthmore.edu/test/bwplotxs.P\\_ViewW4](https://testmyswat.swarthmore.edu/test/bwplotxs.P_ViewW4). The page title is "mySwarthmore" and the user is logged in as an "Employee". The page is titled "W-4 Tax Exemptions/Allowances". A note states: "Your W-4 information determines the amount of Federal Tax that is withheld from your pay. Note that the start date is as of the inception of the Banner Human Resources system in 1999." The "Federal Withholding Tax" section displays the following information:

<b>As of Date:</b>	Dec 09, 2016
<b>Name:</b>	Michael Patrick Smith
<b>Address:</b>	102 Snyder Ave West Chester PA 19382

Additional information:

- Last Name differs from SSN card: No
- Deduction Status: Active
- Start Date: Nov 07, 2016
- End Date:
- Filing Status: Single
- Number of Allowances: 0
- Additional Withholding: .00

Note: Additional amount, if any, you want withheld from each paycheck.

Buttons: [Print](#), [History](#) | [Update](#) | [Vendor Web Site](#)

[ W-2 Year End Earnings Statement ]

RELEASE: 8.13.1

3. As a re-hired employee, if you wish to update your W-4 information, select the Update link at the bottom, center of the page. The Update W-4 Information page will be displayed:

The screenshot shows a web browser window with the URL [https://testmyswarthmore.edu/test/bwplctcmr\\_P\\_UpdateDednW4?dcde=FED](https://testmyswarthmore.edu/test/bwplctcmr_P_UpdateDednW4?dcde=FED). The page title is "mySwarthmore" and the sub-header is "Update W-4 Information". The page contains the following fields and instructions:

- Federal Withholding Tax Deduction Effective as of:** Nov 15, 2016
- Effective Date of Change:** 11/15/2016
- Deduction Status:** Active
- Filing Status:** Single
- Number of Allowances:** 0
- Additional Withholding:** 0

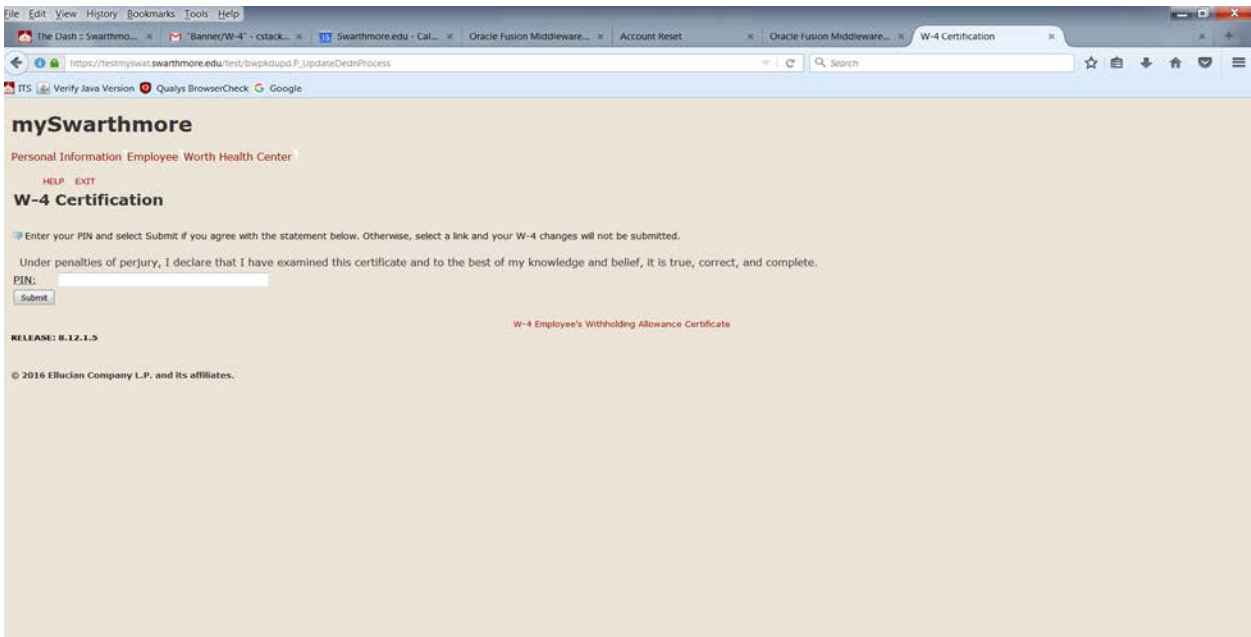
Buttons at the bottom include "Certify Changes" and "Restore Original Values".

4. The Effective Date will automatically default to the day after the date on which you were last paid. As this date could be some time in the past, you should change this date to your new start date (i.e., the date you are returning to work for Swarthmore College).
5. Update the Deduction Status, Filing Status, Number of Allowances and Additional Withholding fields as desired.

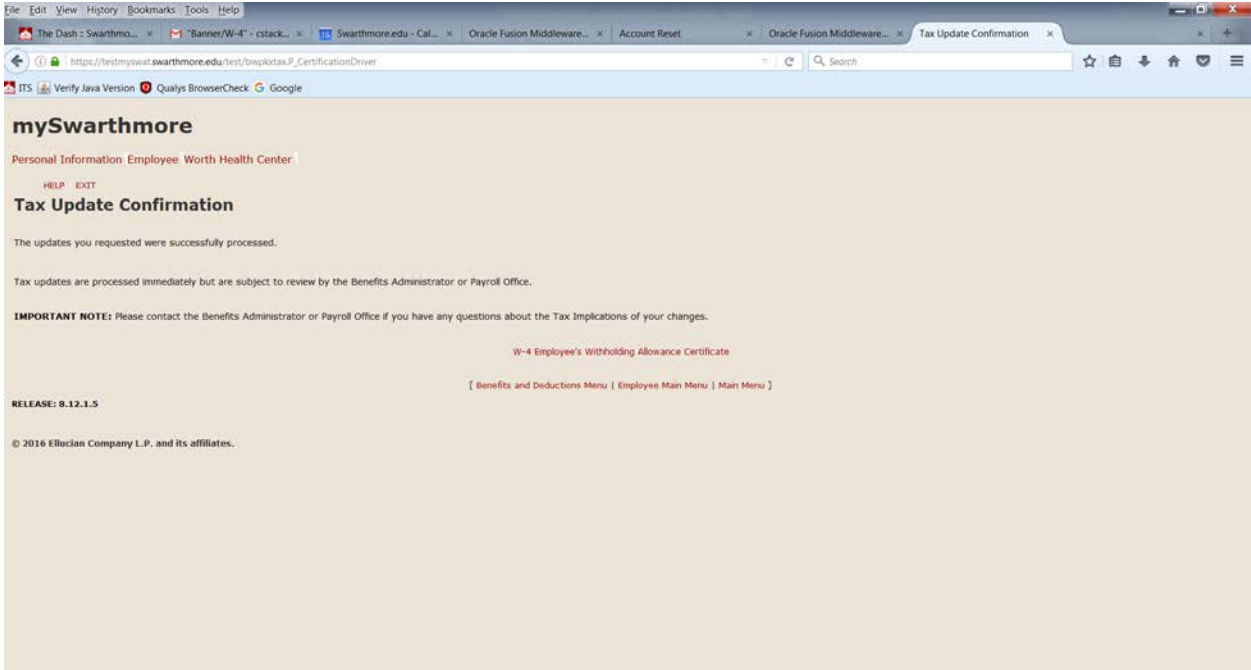
Caution: If you change your deduction status to Exempt, you must meet the eligibility requirements as stated. You will not have federal taxes withheld from your paycheck. You may be liable additional taxes and IRS penalties as a result. Contact the Payroll office if you have any questions regarding use of this status.

6. Select the Certify Changes button.

Note: Select the Restore Original Values button if you do not want to save your changes. When you select Certify Changes, you will be presented with the W-4 Certification page. Enter your **network password** as your PIN and select Submit to sign off on your changes. An electronic audit of the person making the change will be kept on file.



7. If your changes are successfully processed, you will be presented with the following page:



You may select the W-4 Employee's Withholding Allowance Certificate link near the bottom of the page to return to the W-4 Tax Exemptions/Allowance page to verify that your changes were processed.

File Edit View History Bookmarks Tools Help

The Dash - Swarthmo... Banner/W-4 - cstack... Swarthmore.edu - Cal... Oracle Fusion Middleware... Account Reset Oracle Fusion Middleware... W-4 Tax Exemptions/Allo...

https://testmyswat.swarthmore.edu/test/bwplotxcP\_ViewW4

ITS Verify Java Version Qualys BrowserCheck Google

# mySwarthmore

Personal Information Employee Worth Health Center

RETURN TO MENU HELP EXIT

## W-4 Tax Exemptions/Allowances

Your W-4 information determines the amount of Federal Tax that is withheld from your pay. Note that the start date is as of the inception of the Banner Human Resources system in 1999.

*Federal Withholding Tax*

<b>As of Date:</b>	Nov 15, 2016
<b>Name:</b>	Brandi TestW4 Smith
<b>Address:</b>	300 College Avenue Swarthmore PA 19081

**Last Name differs from SSN card:** No

<b>Deduction Status:</b>	Active
<b>Start Date:</b>	Nov 15, 2016
<b>End Date:</b>	
<b>Filing Status:</b>	Single

<b>Number of Allowances:</b>	.0
<b>Additional Withholding:</b>	.00

Note: Additional amount, if any, you want withheld from each paycheck.

[History](#) | [Update](#) | [Vendor Web Site](#)

[ W-2 Year End Earnings Statement ]

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